

School Tax Elections: Testing Messages and Targeting Voters

By J. Bradford Senden, Ph.D., and Don E. Lifto, Ph.D.



Just one year after a painful election loss and budget reductions measured in the millions, a suburban school district found itself back on the ballot seeking approval for an increase in property taxes to help fund school programs and head off a second round of draconian cuts.

The political stakes were high for the school board and superintendent; the stakes were even higher for the more than 13,000 students whose education futures hung precariously in the balance.

Anticipating a substantially larger voter turnout in the upcoming election, district officials needed to probe—

more precisely than in past tax elections—exactly what demographic groups would most likely go to the polls and support the tax proposal. Message testing and voter targeting became critical components in building a foundation for success.

Message-testing and voter-targeting strategies have been paramount in consumer research and marketing for decades. Traditional direct-mail marketing strategies—transformed in recent years by exponential advancements in technology—now slice and dice with the precision of an executive chef, measuring their ingredients with such exotic tools as “neural networking” and “regression analysis.” These new technologies allow marketers to predict with greater accuracy than ever who will buy their products and services and what messages will resonate with consumers.

Frustrated with the slow pace of adopting these sophisticated strategies in the political arena, Hal Malchow chides in *The New Political Targeting* (Washington, DC: Campaigns and Elections Magazine, 2003), “While commercial marketers stepped boldly into the sunshine of information and knowledge, political marketers have remained mired in the shadows of instinct and misinformation” (p. 6).

In this particular case, the district’s leaders were determined to come out of the shadows by harnessing the power of more sophisticated survey and analysis methodologies.

Peeling Back the Onion

Harnessing that power begins by exploring the response to benchmark questions included in a scientific, random-sample community survey completed for the district as part of its preparation for a return to the ballot. This exploration involves processing responses using the classification tree features of SPSS for Windows.

This analytical tool was developed to make it easier to better identify groups, discover relationships between groups, and predict future events. In such an analysis, the software is asked to evaluate one question by exploring the response among the demographic variables available in the survey.

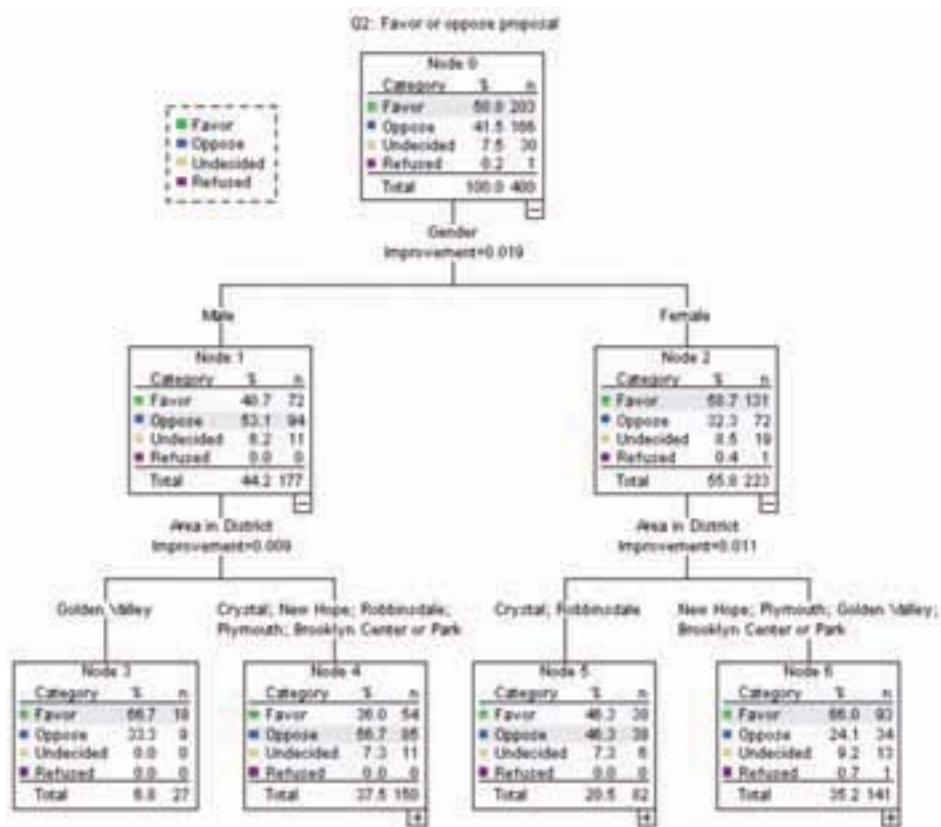


Figure 1. Classification Tree Resulting from Uninformed Benchmark Question

In the district's survey, the uninformed benchmark question presented voters with the following:

The Robbinsdale Area Schools will ask voters to approve an increase in its existing operating levy this fall. The proposed referendum will raise \$9 million in new funding for the district. This will result in a property tax increase of approximately \$230 per year for a home with an assessed value of \$240,000, which is the average assessed value of a home in the district. This increase translates into a cost of \$19 per month. Would you favor or oppose such an increase?

When the classification tree analysis was applied to the responses to this question, it produced the classification tree illustrated in Figure 1.

The analysis software had access to all the demographic characteristics of the voters interviewed as part of this survey. This classification tree tells us that the greatest difference in voter response is found among men and women (the first branch of the tree). As is true in most tax elections, women are more supportive of the district's proposed tax increase.

The second set of branches in the classification tree tells us that the area of the district in which the voter lives is important. For example, men living in the Golden Valley area are more supportive than other men in the district, whereas women in the Robbinsdale and Crystal areas are less supportive than women in the rest of the district.

After the presentation of the uninformed benchmark question, the voters being interviewed were given detailed information about the tax proposal the district was considering. Each voter was then asked the following informed benchmark question:

Now that you have heard some information about the district's need to ask for an increase in its operating levy, I want to see if this information has changed your opinion. One reminder first: the average assessed value of a home in the district is \$240,000. Would you favor or oppose such an increase knowing that it will raise \$9 million in new funding for the district and result in a property tax increase of approximately \$230 per year—or \$19 per month—for a home with an assessed value of \$240,000?

The classification tree generated from the responses collected after information had been presented is very different (see Figure 2). Gender is no longer the most significant demographic characteristic. Now a voter's age is the most important factor. Age has replaced where men live as the most significant factor among male respondents. Gender is important among younger voters, with women much more supportive of the district's tax proposal after information has been presented.

Among voters older than 48, the area of the district is important. Even after information has been presented, the district's proposal has very little support among older voters in the Robbinsdale area of the district.

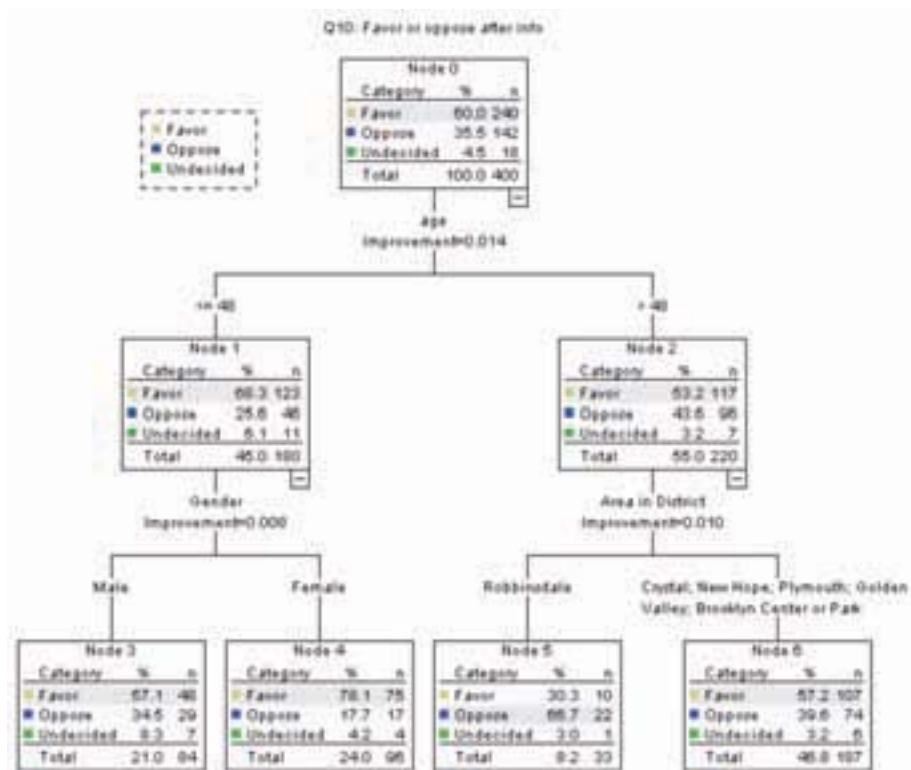


Figure 2. Classification Tree Resulting from Informed Benchmark Question

Exploring the responses to the benchmark questions helps the campaign for the district's proposal focus and target its voter-contact efforts. In this example, the campaign will need to do more than just provide information to the older voters in the Robbinsdale area. Depending on the number of voters in this group and their voting history, the campaign will need to develop a unique approach to this "microtarget" group.

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Researchers can also use classification tree analysis to test how different types of voters respond to statements in support of the district's tax proposal (see Figure 3). In this survey, for example, voters were asked to strongly agree, agree, disagree, or strongly disagree with the following statement: "Investing in the quality of the local public school is essential if we are to maintain a safe, thriving, and vibrant community."

Overall, voters overwhelmingly agreed with this statement, with 92% strongly agreeing or agreeing. Generating a classification tree from these responses, however, revealed significant differences in intensity based on geography and age. The number of voters strongly agreeing with this statement was higher in the Golden Valley, Plymouth, and Robbinsdale areas of the district.

In those geographical areas, agreement with this statement was more intense among voters younger than 66. Therefore, making this statement as part of an argument for the district's tax proposal will have its greatest impact among younger voters in these areas of the district.

One of the most common advocacy arguments in school tax elections is the contention that investing in quality schools enhances the value of homes and businesses within the district. Rather than simply relying on faith as to whether such an argument might work in any school district, it can be tested scientifically.

We can determine the best audience for this idea by applying classification tree analysis to the responses collected when voters were asked to agree or disagree with the statement: "Investing in the quality of the local public schools will protect the value of every home and business in the community."

The classification analysis makes it clear that age is an important factor in determining which voters will have the strongest positive reaction to this statement (see Figure 4). Voters 38 years old or younger are more likely

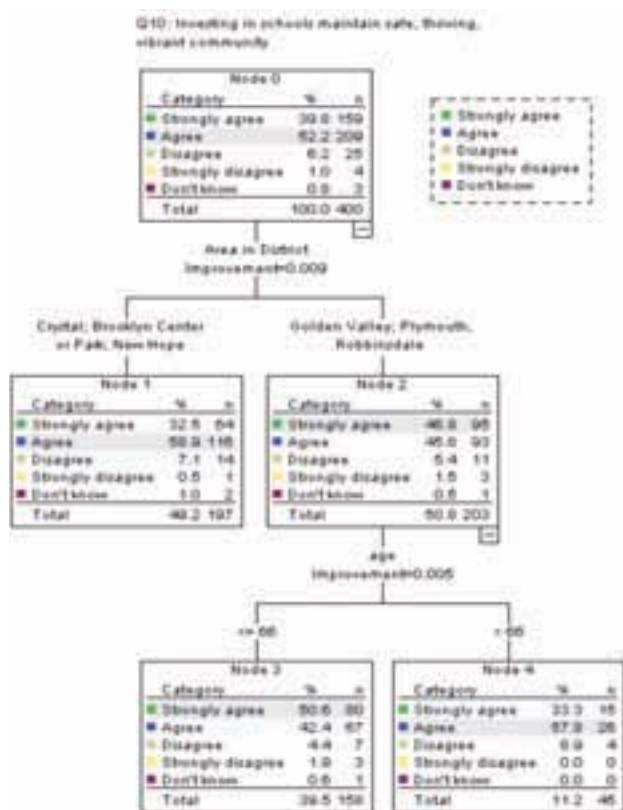


Figure 3. Classification Tree Resulting from Responses to Statement Supporting the District's Tax Proposal

to strongly agree with this statement than are voters older than 38.

The area of the district in which the voter lives is also important among older voters. In the Golden Valley, Plymouth, and Crystal areas of the district, older voters are slightly more likely to strongly agree with this statement than are the older voters in the rest of the district. Of some concern, however, is the fact that almost as many older voters in these areas say they disagree with this statement as those who say they strongly agree with it.

The presentation of this statement in these areas produces both a positive and a negative reaction; therefore, the campaign in support of the district's proposal must target younger voters with the presentation of this idea.

Research to Practice

As the number of school-age families continues to shrink and voters are increasingly tightfisted with their hard-earned dollars, passing new school taxes is becoming more difficult. The politics of talk radio and the impact of a variety of instant-messaging technologies also contribute to an increasingly difficult landscape. This election context is one that is unlikely to respond well to the strategies of the past.

Hal Malchow's exhortation to step out of "the shadows of instinct and misinformation" and into the "sunshine of

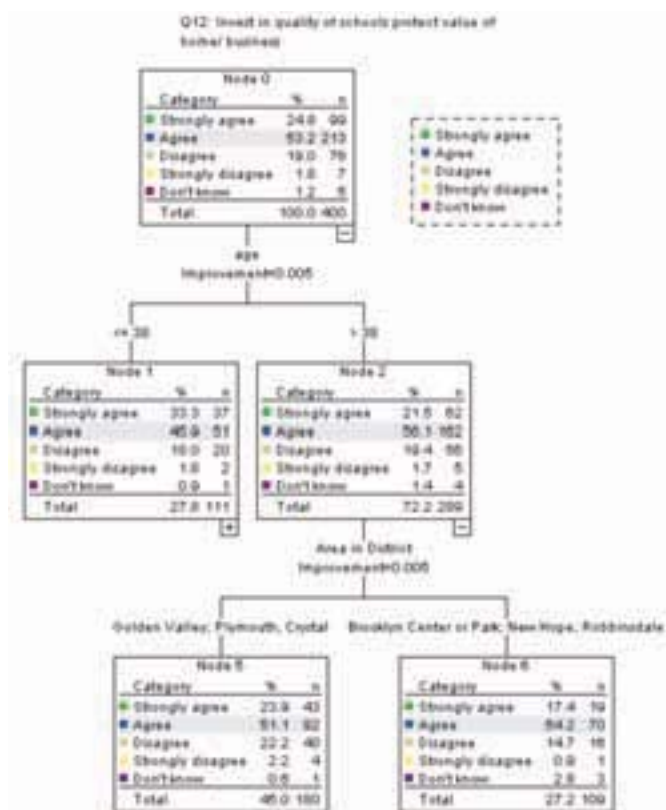


Figure 4. Classification Tree Resulting from Responses to Statement Regarding Investing in Schools

information and knowledge" is demonstrated by the survey and message-testing strategies outlined here. Analyzing the feasibility of the tax proposal with a well-designed, scientific, random-sample survey and then using sophisticated analytics to test voters' responses to arguments and elements of the potential tax proposal provide the district and campaign with the information and knowledge needed to communicate effectively.

In the case of this suburban school district, a devastating loss was followed one year later by a very successful campaign and two ballot questions that succeeded at the polls. The analytical tools described in this article were part of the foundation for moving forward with data-driven planning and effective campaign strategies.

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